Digital archival collections group purchasing scheme

Buyers guide 2019-2020

What is the scope of the framework?

This framework acts as a vehicle which allows institutions access to static digital archival collections under a group purchasing scheme. Framework is the term used to describe the resulting agreement between Jisc Services Ltd (JSL) and the publishers to provide this service to the Jisc community. The framework will be managed internally by Jisc Collections, a department within Jisc Services Ltd (JSL). Jisc Collections will be referred to as the administrators of the framework.

Users of the framework

This framework will be available to Higher Education Institutions as defined in Jisc Banding.

Features overview

The digital archival collections group purchasing scheme is designed to leverage the collective purchasing power of institutions and is based on the principle ‘the more products are bought, the lower the price’. That is, the more products are bought per publisher by any institution over the course of an academic year, the lower the price for those participating based on pre-set discount triggers.

Publishers will offer a selection of products relevant to Higher Education Institutions (HEIs). All products are offered as one-off perpetual purchase and include in the price any access or platform fees, thus eliminating recurrent annual access/platform charges.

The digital archival collections group purchasing scheme will run on an annual basis (based on the academic year, August –July), allowing institutions to benefit from the maximum discount reached by the end of each academic year.

Digital archival collections can comprise of many forms of digitised materials including, but not limited to texts, manuscripts, illustrations, photographs, maps, pamphlets, diaries, correspondence, ephemera, cartoons and audio-visual materials. Digital archival collections are predominately focused on the arts, humanities and social science studies. Time span from incunabula (pre-1501) to the present.
How does the framework operate?

Framework agreement in practice

The framework operates with each publisher having an equal ranking unlike other framework agreements where the awarded suppliers are ranked in order of ascending order based on the quality of their offering. In addition, there is no requirement for mini competitions to be carried out by subscribing institutions.

Each publisher on the framework will have the same opportunity to promote its respective content to generate interest and sales.

During the life of the framework the selection of the most capable publisher will be solely on the merit of its content and the relevancy to each respective institution. It is acknowledged that factors such as cost, and budget constraints will form part of the decision-making process carried out by institutions before making a purchase.

To allow for the yearly contracting process between publishers and Jisc Collections, and the creation of the yearly product pages on the Licence subscriptions manager website, the group purchasing scheme will be offered to the Higher Education sector around November of each year and run through to the end of July in the following year. This will afford institutions time to build business cases around acquiring digital archival collections as well as taking advantage of any year-end spend that may be available in institutions.

Key relationships/ activities:

The framework agreement is managed via a contract between Jisc services Ltd (Jisc Collections) and the Publisher

An agreement will exist between the Publisher and the Institution to provide this service.

Jisc Collections will handle invoicing for all products designated as ‘Sublicense’ as specified in the licence. Publishers will handle invoicing for all products designated as ‘Direct’ in the licence.

Publishers have the discretion to decide which, and how many products to offer as part of the group purchasing scheme up to a maximum of 20 products per annual cycle and will have the discretion to change this offering at each annual review.

Publishers have provided pricing for the 2019-2020 period in the format of the Jisc banding structure for each product on offer on which discounts will be applied based on set percentage (%) discount triggers. Following consultation with publishers and based on the performance of the previous year’s products, Jisc Collections will set the % triggers for the products offered on a year by year basis throughout the length of the framework agreement (4 years). Jisc has stipulated that in year one of the group purchasing scheme the initial % discount will start at 20% off the list price of the products offered by all publishers. At the start of each yearly group purchasing cycle, discount levels will reset to cover the products offered in that academic year following Jisc Collections review of the % trigger points. For 2019-2020 the initial % discount will remain at 20%.

The first sale of any of the products offered by a publisher participating in the group purchasing scheme will trigger the initial % discount (20% in year one of the group purchasing scheme) and then increase in 5% increments based on the volume of products sold by that publisher (e.g. 1-4 products sold = 20% discount on list price; 5-9 products sold = 25% discount on list price and so on). The following table is an example of how this could be applied in practice.
Publishers have been given the discretion to decide how many product sales will trigger each 5% discount increment (e.g. how many product sales qualify for the initial % discount, how many product sales fall into the subsequent % trigger bracket, etc.). No additional/separately negotiated discounts (other than product sales triggering the higher discount thresholds) on the submitted price is allowable for products included in the group purchasing scheme. The final percentage discount on the list price for all products purchased by institutions throughout the academic year will be calculated just before the end of each financial year (July).

On Thursday 30 April 2020, HMRC announced the introduction of the VAT zero-rating for e-books, e-newspapers, e-magazines and academic e-journals with effect from 1 May 2020. Due to the COVID-19 pandemic, this was brought forward from the original date of 1 December 2020 to reduce the cost of access to online publications. 


VAT will be charged at either zero-rate or 20% depending on the tax status of that collection. Content invoiced through Jisc Licensing will be subject to a transaction management charge(TMC). In line with HMRC regulations, the TMC will be charged at the standard 20% VAT.

The Digital Archival Collections Group Purchasing scheme service page provides more information on the publishers and products offered in 2019-2020.

<table>
<thead>
<tr>
<th>1. Product name: A collection name</th>
<th>List price (before any discount applies) incl one-off platform fee</th>
<th>Discount Threshold 1</th>
<th>Discount Threshold 2</th>
<th>Discount Threshold 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Discount Threshold 1 purchased by any HEIs - 20% discount</td>
<td>Discount Threshold 2 purchased by any HEIs - 25% discount</td>
<td>Discount Threshold 3 purchased by any HEIs - 30% discount</td>
<td></td>
</tr>
<tr>
<td>Band 1</td>
<td>£12,000.00</td>
<td>£9,600.00</td>
<td>£9,000.00</td>
<td>£8,400.00</td>
</tr>
<tr>
<td>Band 2</td>
<td>£10,000.00</td>
<td>£8,000.00</td>
<td>£7,500.00</td>
<td>£7,000.00</td>
</tr>
<tr>
<td>Band 3</td>
<td>£8,500.00</td>
<td>£6,800.00</td>
<td>£6,375.00</td>
<td>£5,950.00</td>
</tr>
<tr>
<td>Band 4</td>
<td>£7,000.00</td>
<td>£5,600.00</td>
<td>£5,250.00</td>
<td>£4,900.00</td>
</tr>
<tr>
<td>Band 5A/5B</td>
<td>£5,500.00</td>
<td>£4,400.00</td>
<td>£4,125.00</td>
<td>£3,850.00</td>
</tr>
<tr>
<td>Band 6</td>
<td>£4,500.00</td>
<td>£3,600.00</td>
<td>£3,375.00</td>
<td>£3,150.00</td>
</tr>
<tr>
<td>Band 7</td>
<td>£3,000.00</td>
<td>£2,400.00</td>
<td>£2,250.00</td>
<td>£2,100.00</td>
</tr>
<tr>
<td>Band 8</td>
<td>£2,500.00</td>
<td>£2,000.00</td>
<td>£1,875.00</td>
<td>£1,750.00</td>
</tr>
<tr>
<td>Band 9</td>
<td>£2,000.00</td>
<td>£1,600.00</td>
<td>£1,500.00</td>
<td>£1,400.00</td>
</tr>
<tr>
<td>Band 10</td>
<td>£1,500.00</td>
<td>£1,200.00</td>
<td>£1,125.00</td>
<td>£1,050.00</td>
</tr>
</tbody>
</table>

What is the duration of the framework?

The framework will be in place for 2 years from 2018, with an option to extend the framework by 2 further 1-year periods.

Was this framework tendered under EU procurement rules?

Yes, this procurement process followed the EU ‘open’ procurement procedure. There is no requirement for institutions to carry out any further ‘procurement’ exercises before purchasing content under this framework.

What evaluation criteria were used?

Publishers were assessed on numerous mandatory requirements to be awarded a position on this framework, including (but not limited to):

- Compliance to the group purchasing scheme and products offered
- Charges and subscription models – adherence to the model subscription and Jisc banding structure
- Quality management systems
- Information security systems
- Economic and financial standing
- Requirements under modern slavery act 2015
- Contract form – adherence to the Jisc model licence (with accepted amendments, where applicable)
- Rights clearance and copyright infringement terms
- Usage statistics – COUNTER compliance
- Standards – W3C compliance
- Access - All products to be available via Federated Access and via IP access remotely to all students and staff of Institutions’ websites, or the product website itself

This framework was not scored on comparative pricing due to the nature of the content, and the different publications offered.

**Are there terms and conditions that must be used?**

All products purchased by institutions will be contracted using a Jisc Model Licence opposed to individual publishers’ licenses.

Publishers have either accepted unconditionally the terms of Jisc Services Ltd.’s license agreement, provided acceptable amendments to the Jisc Collections terms, or submitted their own license agreements. More information on this is made available on the Jisc Collections catalogue pages. Jisc Collections only accepted Publishers amendments to the Jisc Collections agreement and Publishers’ own terms if they were ACCEPTABLE to Jisc Collections.

**How do I place an order?**

Publisher information is available via the Licence subscriptions manager, where institutions can review the catalogue pages and place their orders.

Orders for any products purchased under the framework must be placed directly through Licence subscriptions manager.

Once an institution has placed an order through the catalogue page, the Publisher receives a notification. The Publisher will proceed with setting up access using the access details stored in the institutions account and contact the institution with access URLs, confirming this has been set up.

Publishers have the option to either invoice members directly, or to instruct Jisc Licensing to handle invoicing on their behalf. In both instances, the default position is to issue invoices after the scheme has closed each year (July 31). Early invoicing is permissible. If institutions require invoicing before the framework closing date, a credit note will be applied after the framework is complete if the discount threshold increases.

Please contact the License subscription manager helpdesk for more information.